

**NORTH AMERICAN TECHNOLOGY  
AND  
INDUSTRIAL BASE ORGANIZATION**

**NATIBO**

***Operations & 3 Year Business  
Plan***



NATIBO

***. . . A Forum for Cooperation***



# NATIB

... A Forum for

# Cooperation

## *Outline*

- ♦ Background
- ♦ Organization
- ♦ NATIBO Products & Services
  - Memorandum of Understanding
  - Studies & Assessments
  - Advocacy Activities
- ♦ Work Plans
- ♦ Summary



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## Background

- ◆ **Joint Canadian DND - US DoD organization**
- ◆ **Based on 1985 “Shamrock Summit” pledge by President Reagan and Prime Minister Mulroney**
- ◆ **1987 NATIBO Charter with 1994, 1997 revisions**
  - “promote...and...execute...DoD and DND technology and industrial base programs and *policies*”
  - “foster cooperation...in development of coordinated technology and IB policies...that promote the *integration of the defense and commercial industrial sector*”
  - “ensure that North American technology and IB considerations are taken into account during US or Canadian *military or civilian* planning emergencies



## *Background*

### **Mission**

**In support of North American national security, the NATIBO facilitates technology and industrial base efforts between the U.S. and Canadian Defense Departments**

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## *Background*

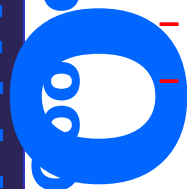
- ◆ NATIB Memorandum of Understanding (MOU) signed May 2001
- ◆ Covers NATIBO Activities
  - Coordination of technology & industrial base activities
  - Development and evaluation of demonstrators/prototypes
  - Integration of defense & commercial industrial sectors
  - Technology insertion and industrial base data projects
  - Studies/Assessments
- ◆ Facilitates Information Exchange, Working Groups and Project Arrangements
- ◆ MOU allows assignment of Cooperative Project Personnel and contracting on behalf of the other nation



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## Organization Steering Committee

### ◆ **Appointment**

- “Each Participant in the NATIBO MOU will appoint its national Steering Committee (SC) Co-Chair”
- “Each Participant (through its MOU Co-Chair) will select members of the NATIBO MOU SC”

### ◆ **Responsibilities**

- Meet no less than annually
- Approval authority for Working Groups and Project Arrangements under the NATIBO MOU
- Advocacy and education
- Developing MOU processes, monitoring their effectiveness and recommending/implementing improvements

### ◆ **Resources**

- Personnel are assigned (no dedicated support)
- No budgeted funding line in place (funding provided by participants on a project-by-project basis)



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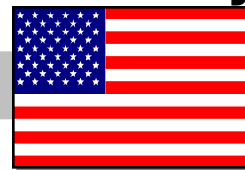
## Organization Steering Committee - Principals

**Canada**



**Co-Chair: DND (DG  
International & Industry  
Programs)**

**U.S**



**Co-Chair: DUSD (Office of  
Technology Transition)**

**Army**

**Navy**

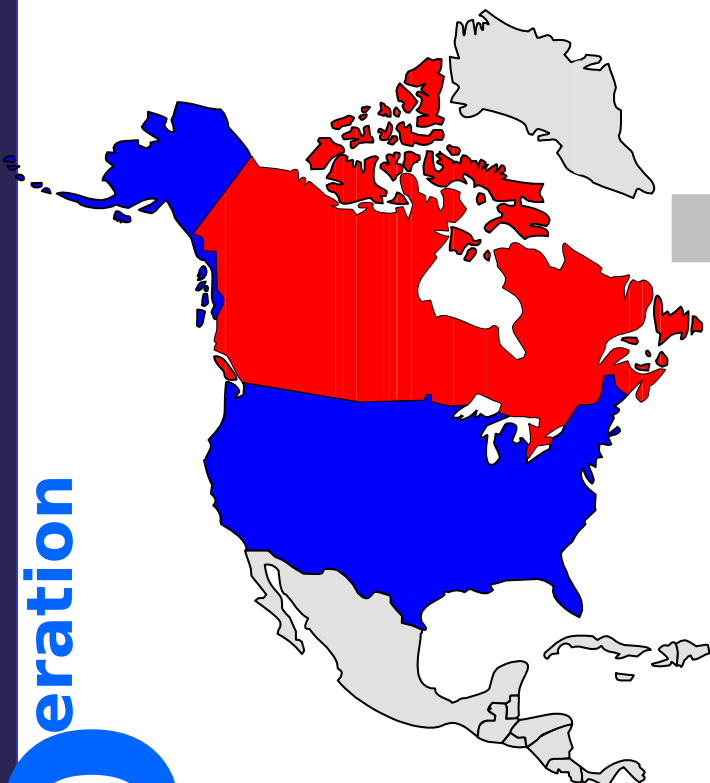
**Air Force**

**Marine Corps**

**Missile Defense Agency**

**Defense Logistics Agency**

**DCMA**





# Organization

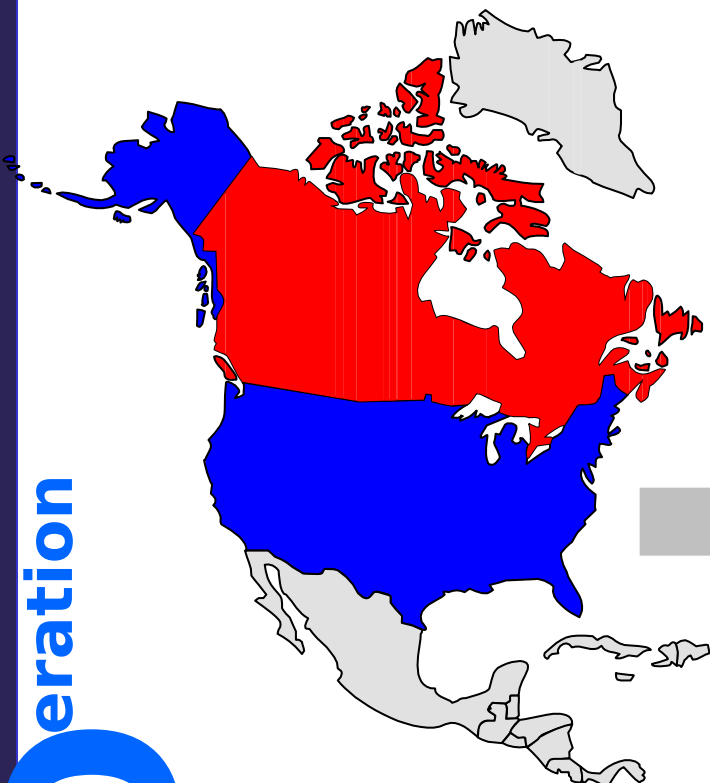
## Steering Committee - Observers

### Canada



- DND: Canadian Defense Liaison Staff (Washington) and Director Industry Relations, Analysis and Policy/DGIIP
- Technology Partnership Canada
- Industry Canada
- Canadian Commercial Corp.

- DHS
- Department of Commerce
- DUSD(AT&L), International Cooperation



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## *Organization* **Secretariat**

### ◆ **Appointment**

- Selected by both Participants in support of the NATIBO MOU
- US AMSAA has been NATIBO Secretariat since 1987
- Secretariat is currently staffed by DoD (jointly funded by Services and DND)

### ◆ **Responsibilities**

- Maintain all NATIBO related documentation and correspondence
- MOU details Secretariat responsibilities including keeping an inventory of all project background and foreground information exchanged between the participants



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## Organization

### Business Development Working Group (BDWG)

- ◆ NATIBO Steering Committee created BDWG to:
  - Identify areas for collaborative activities
  - Promote and facilitate the use of the MOU for executing collaborative project arrangements
  - Assist potential users in developing and staffing the documents necessary to initiate an international project arrangement
- ◆ BDWG Points of Contact:
  - US Army [natibo@army.mil](mailto:natibo@army.mil)
  - US Navy [natibo@navy.mil](mailto:natibo@navy.mil)
  - US Air Force [natibo@af.mil](mailto:natibo@af.mil)
  - USMC [natibo@usmc.mil](mailto:natibo@usmc.mil)
  - OSD [natibo@osd.mil](mailto:natibo@osd.mil)
  - DND [natibo@forces.gc.ca](mailto:natibo@forces.gc.ca)



# *Products & Services*

## **Memorandum of Understanding (MOU)**

### ◆ **Information Exchange**

- Includes reports, data bases
- WGs must submit list of exchanged documents to Secretariat on annual basis

### ◆ **Controlled/Classified**

- Controlled Unclassified: Must be marked. Limited to Project Information use only.
- Classified: Up to SECRET. Must comply with Department Guidelines and Procedures

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## *Products & Services* **Memorandum of Understanding (MOU)**

### ◆ **Working Groups**

- "Sub-committees and WGs, ... may be established by the SC with concurrence of the participants. They will be established to address specific areas of concern and propose courses of action to the SC for assigned tasks"
- Require approved **Terms of Reference (TOR)**
- Provide annual status to Steering Committee

### ◆ **Terms of Reference:**

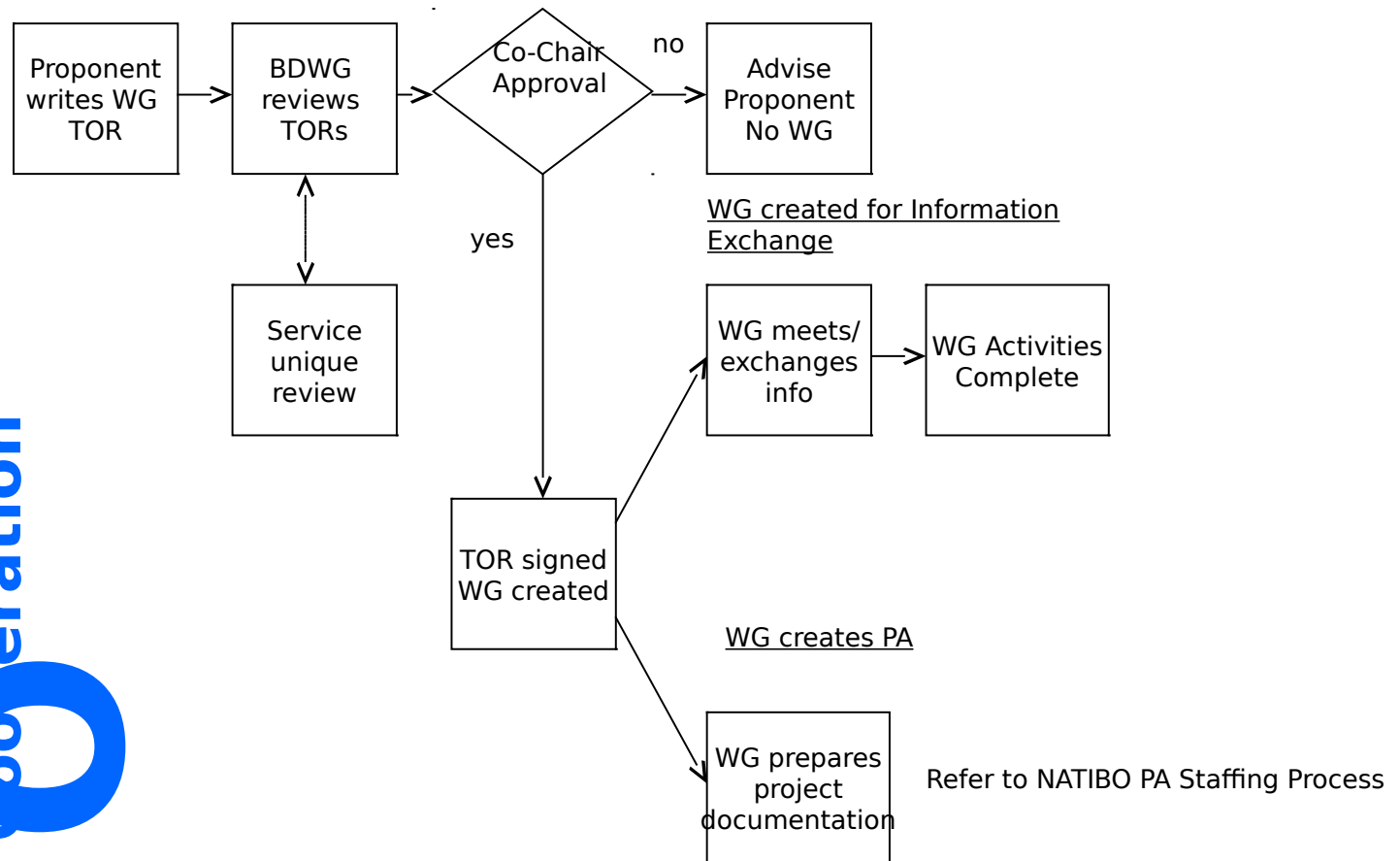
- Defines intent to work under the NATIBO MOU
- Formally establishes a Working Group
- Identifies who is involved
- Provides a scope of activity
- Outlines any specific responsibilities
- Obtains Co-Chair approval for the effort

◆ **Format and example available on NATIBO Website**



# Products & Services Memorandum of Understanding (MOU)

## Overall NATIBO TOR Approval Process





# *Products & Services*

## **Memorandum of Understanding (MOU)**

### **Current Working Groups & Date Established**

- ◆ **Light Armored Vehicle**      **July 2001**
- ◆ **Fuel Cell**      **Oct 2001**
- ◆ **Gas Turbine Engine IBA**      **July 2002\***
- ◆ **First Responder Technology**      **Dec 2002\***
- ◆ **Soldier System Technology**      **Jan 2003**
- ◆ **Future Fire Control Systems**      **Jan 2003**
- ◆ **Med Log Vehicle Replacement**      **Mar 2003**
- ◆ **Tactical Communication & Info Systems Modeling**      **Apr 2004**
- ◆ **Homeland Defense**      **Apr 2005**

\* TOR concluded, term expired

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## *Products & Services* **Memorandum of Understanding (MOU)**

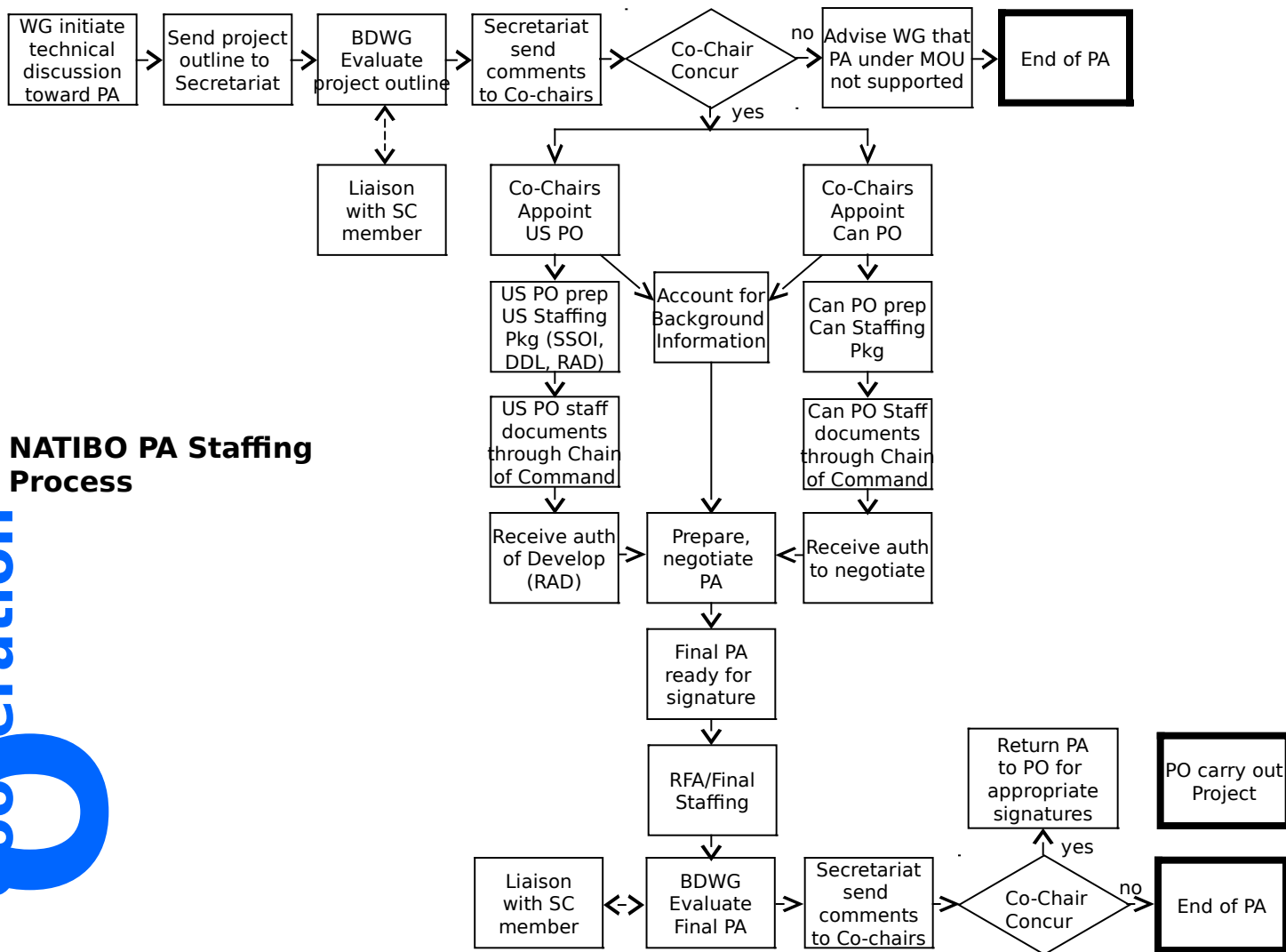
### ◆ **Project Arrangements**

- “Leverage resources through cost sharing and economies of scale afforded through coordinated studies and projects”
- Historically funded by mutually acceptable amounts from Services and DND
- “Each Participant will bear its equitable share of the total estimated cost of each NATIB PA and will receive an equitable share of the results, in accordance with the provisions of this MOU and the applicable NATIB PA.”
  - Equitability is evaluated on a case-by-case basis
  - Equitability issues are part of the project/PA negotiation process



# Products & Services

## Memorandum of Understanding (MOU)



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# *Products & Services* **Studies and Assessments**

## ◆ **History**

- Conceptual framework for “Technology Base Enhancement Program” initiated in 1991
- Program formalized in 1992
- Joint investment thru FY04, approx. \$10M

## ◆ **Scope**

- Survey North American technology and industrial base capabilities
- Analyze technology maturity and to what extent it has transitioned to a production environment
- Identify future trends/problems
- Develop roadmaps of strategic initiatives (both investment and non-investment)

## ◆ **Process**

- Originated by NATIBO (usually by BDWG)
- Sponsored by NATIBO (may require establishing a Working Group)

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# *Products & Services* **Studies and Assessments**

## **Considerations for Selection:**

- ◆ Critical to defense requirements
- ◆ Pervasive use by Services and Canadian Forces
- ◆ Commercial leverage (“Dual-use”)
- ◆ Status of technology vis-à-vis international competition
- ◆ Force multiplier
- ◆ Need for government action
- ◆ Affordability of the technology
- ◆ High potential payback from minimum resources

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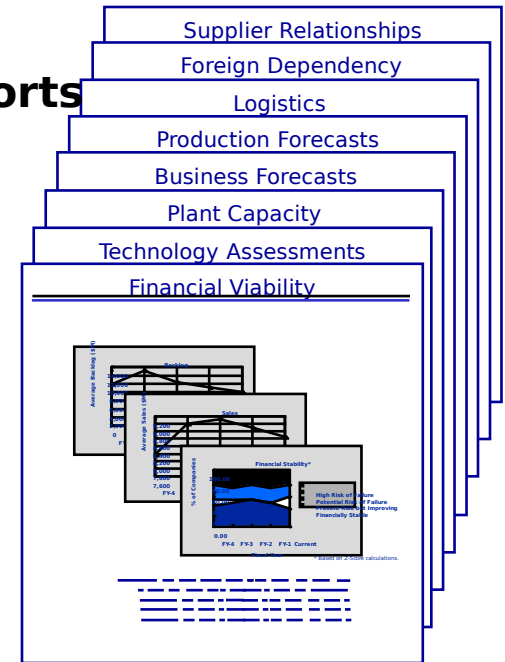
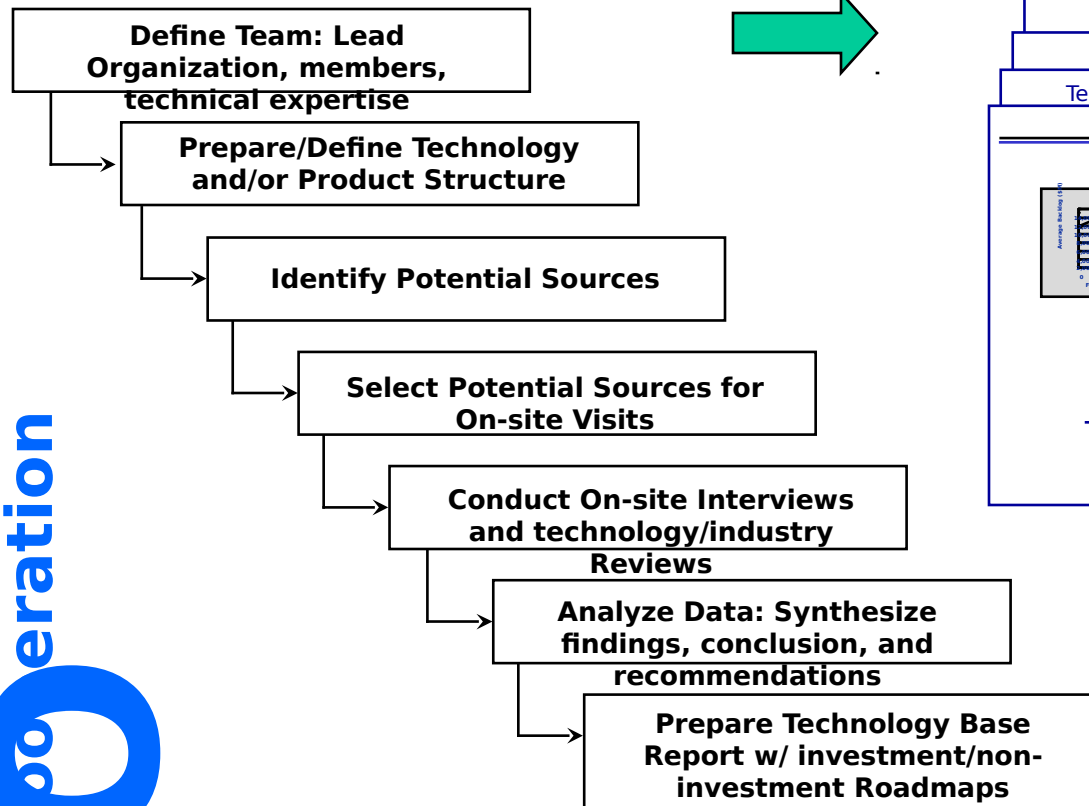
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# Products & Services Studies and Assessments

## Defined Process leads to Reports



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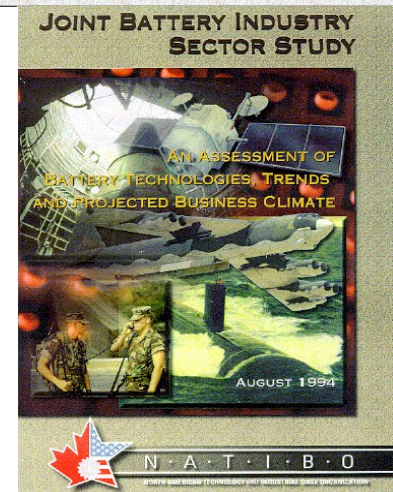
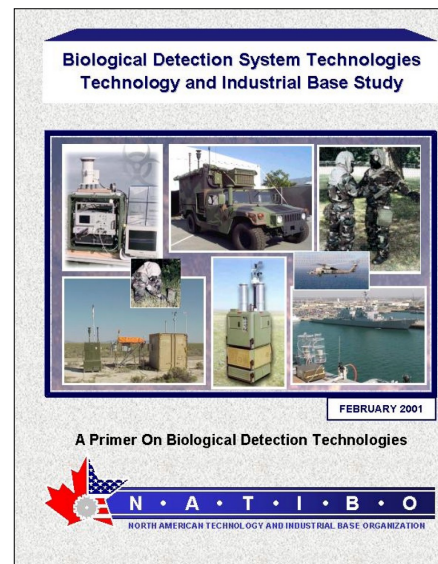
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# Products & Services Studies and Assessments

- ◆ 1993 Metal Matrix Composites Study
- ◆ 1994 Battery Industry Study
- ◆ 1996 Collaborative Virtual Prototyping Study
- ◆ 1996 Ion Beam Processing Study
- ◆ 1998 Corrosion Detection Technologies Study
- ◆ 1999 Rechargeable Battery Study
- ◆ 2001 Biological Detection Systems Technology Study
- ◆ 2001 Collaborative Opportunities in DMSMS
- ◆ 2003 Small Gas Turbine Engine Study
- ◆ 2004 First Responder Technologies Study



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# *Products & Services* **Studies and Assessments**

## ◆ **Streamlined Processes**

- Goal: Improve responsiveness and relevance of technology and industrial base studies by reducing lead times from historical 18 months to less than 12
- More frequent use of organic (government) resources, e.g., DMSMS and First Responder studies
- Increased NATIBO sponsoring of proposed Joint Studies, e.g., Small GTE and ongoing Battery efforts

## ◆ **Resources**

- Provided by participants
- Can include funding, manpower, or information

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## *Products & Services* **Advocacy Activities**

- ◆ **Web site is primary communication media available to Co-Chairs**
- ◆ **Maintained by DTIC**
- ◆ **Planned Web site enhancements:**
  - Reference sections on topics such as information exchange, NATIBO process charts
  - Links to OSD and Service International Program Offices (see next chart)
    - Highlight policies and procedures relevant to use of MOU
    - Knowledgeable points of contact
  - User's Group Area to post comments/testimonials
  - Information on other US/Canada Agreements and what's best to use when
- ◆ **Developing additional boilerplates (e.g., TOR for information exchange)**



# *Products & Services*

## **Advocacy Activities**

### ◆ **Key Organizations/Sites (not inclusive)**

- **DGIIP, Directorate of Continental Materiel Cooperation**  
([www.forces.gc.ca/admmat/dgiip/dcmc](http://www.forces.gc.ca/admmat/dgiip/dcmc))
- **International Cooperation, OUSD(AT&L)**  
([www.acq.osd.mil/ic/](http://www.acq.osd.mil/ic/))
- **Defense Security Cooperation Agency** ([www.dsca.osd.mil](http://www.dsca.osd.mil))
- **Defense Threat Reduction Agency** ([www.dtra.mil](http://www.dtra.mil))
- **US Army Defense Exports and Cooperation**  
([https://usasa.army.mil/DASA\\_DEC](https://usasa.army.mil/DASA_DEC))
- **US Army Security Assistance Command**  
([www.usasac.army.mil](http://www.usasac.army.mil))
- **Naval Inventory Control Point, International Programs**  
([www.navicp.navy.mil/of/ofhome](http://www.navicp.navy.mil/of/ofhome))
- **Air Force Security Assistance Center**  
(<https://rock.afsac.wpafb.af.mil>)
- **Deputy Under Secretary of the Air Force, International Affairs** ([www.safia.hq.af.mil](http://www.safia.hq.af.mil))
- **Canadian Forces** ([www.airforce.forces.gc.ca](http://www.airforce.forces.gc.ca) ,  
[www.army.forces.gc.ca](http://www.army.forces.gc.ca) , [www.navy.forces.gc.ca](http://www.navy.forces.gc.ca))

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## Advocacy Activities

- ◆ Develop links between NATIBO site and Bi-National Planning Group

<https://www.noradnorthcom.mil/BPG>

**Bi-National Planning Group (BPG)**  
NIPRNET Portal Classified up to **UNCLASSIFIED**

**Quick Launch**  
[Contacts](#)  
[BPG Library](#)

**Search Documents**  
  
[Go](#)

**Mission Statement:**  
The Bi-National Planning Group develops bi-national maritime, land and civil support contingency plans and decision-making arrangements to respond to threats, attacks, incidents or emergency circumstances requiring bi-national military or civil/military response to maintain the security of Canada and the United States.

**BPG Corner-Stone Documents** [Add new document](#)

File Name	Modified By
BPG Backgrounder	Burkett Jeff W Maj USAF USNORTHCOM JSSP
Future CANUS Cooperation	Walls Kenny CDR USN NORAD BPG
Enhanced Military Cooperation Agreement (Dec 2002)	Burkett Jeff W Maj USAF USNORTHCOM JSSP
BPG Terms of Reference	Burkett Jeff W Maj USAF USNORTHCOM JSSP

**BPG Calendar** [Add new link](#)  
[Monthly Calendar](#)

**Events** [Add new event](#)  
5/18/2004 12:00 AM [CI/LE Conference](#)  
Counterintelligence/Law Enforcement Conference  
N-NCJ2

The principle objective of the conference is to identify and define key issues and challenges that require resolution for effective information sharing among Canadian and US Law Enforcement, Intelligence...

**CI/LE Conference Read Ahead** [Add new document](#)

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[Canadian & US Plans](#)

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# Products & Services Advocacy Activities

## ◆ Decision Matrix

- Highlight “Best Vehicle” for cooperative activities
- Provide background (possible web site links) on each

	Bilateral Defense Cooperation Tools									
Responsibility of	Science and Technology Establishments					Operational/Engineering/Material Establishments				
	Technical Research and Development Program	Technology Demonstration Program	Defence Industrial Research Program	Multilateral Master Information Exchange Agreement **	The Technical Cooperation Program*	CANUSTEP	NATIBO	MDEAs **	Specific MoUs	DoD Acquisition Framework
Activity Program/Agreement										
Basic Science										
Applied Science										
Operational Requirements										
Concept of Operations										Concept Refinement
Project Documentation										
Engineering Development										Technology Development
Proof of Concept/Demonstration										System Development and Demonstration
Production and Deployment										Production and Deployment
Test and Evaluation										
Sustainment and Maintenance										Operations and Support
Commercial Applications										
Industrial Base										

\* Agreement includes also UK, AU, NZ

\*\* Primarily used by the respective Navies

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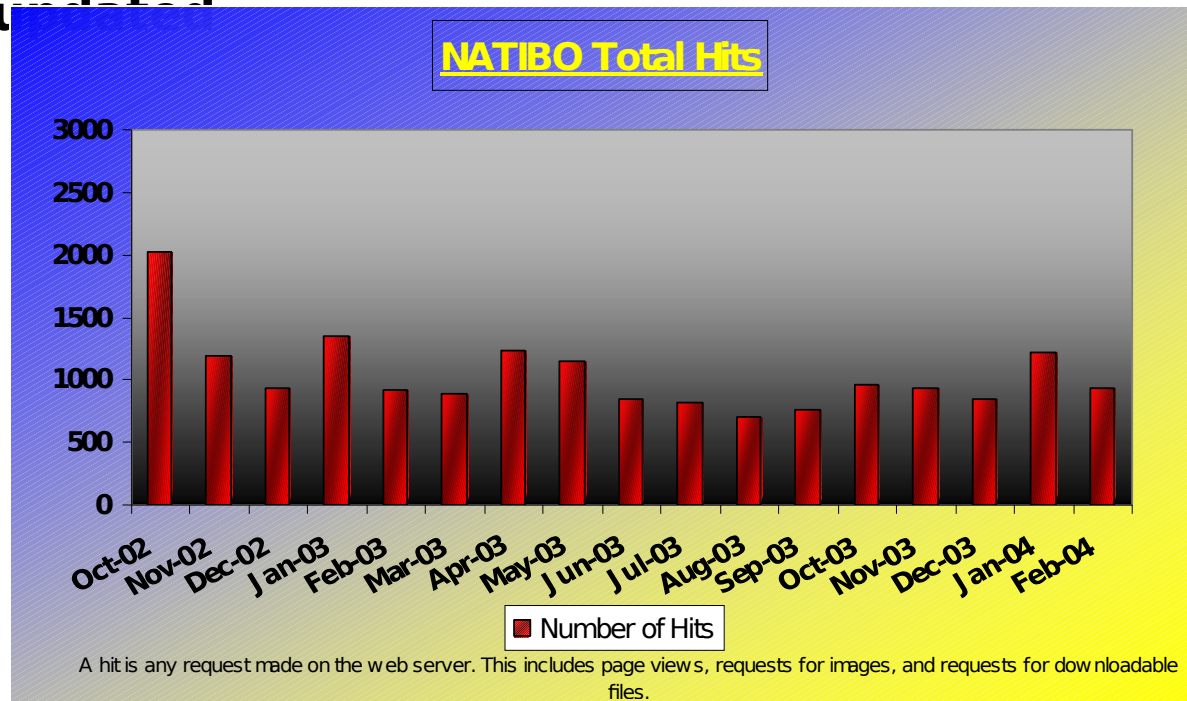
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# Products & Services Advocacy Activities

## ◆ RDT&E Infrastructure Information

- Usage has been declining
- Looking at integrating WVa HighTech Consortium Effort ([www.navytechmatch.com](http://www.navytechmatch.com))
- Will transition to TechMatch as site is updated



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## *Products & Services* **Advocacy Activities**

### ◆ **NATIBO Conference Display**

- Continue attendance at the Defense Manufacturing Conference (DMC) but update display to highlight what the MOU can do for that particular community, Dec 04
  - Update Completed
  - Presented at DMC 2004 in Las Vegas
- Return to a few of the large Service related conferences that are heavily attended by Program Mgrs
- Develop short promotional tool for desktop presentation



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## *Products & Services* **Advocacy Activities**

### ◆ **Other Mechanisms**

- DAU presentations (S&T Managers Course), updating as appropriate
- Target specific population (Project Directors and Equipment Project Managers)
- Foreign Liaison Officers (FLOs)
  - Knowledgeable assets already in-place with access to broad customer community
  - Current use of FLOs still ad-hoc, some members leverage more than others
  - Maintaining consolidated US and CA FLOs directory (place on updated web site)



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## 3 Year Plan Milestone Schedule

Activity	CY2005	CY2006	CY2007
Steering Committee Mtgs	▲ Victoria, B.C.	▲	▲
Advocacy Plan	▲▲ Web-Site Update		
Potential Areas for DND/DOD Cooperation on Homeland Defense	▲■■■▲		
First Responder access to Military Equipment (Benefits & Challenges)	▲■■■▲		
MOU Revision		▲■■■■■▲	
Airborne Surveillance	▲■■■▲ Develop Scope	▲■■■▲	



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## Work Plans

### #1 Advocacy Plan

#### ◆ Requirement

- Educate broader audience on NATIBO and MOU
- Provide more “How To” Information to potential MOU Customers

#### ◆ Expected End Item

- Upgraded Web-Site
  - Expanded Information on leveraging NATIBO products
  - Improved MOU tools & instructions
  - Processes that include links to DoD and DND International Program Offices
- Updated Display for Conferences

#### ◆ Resources

- DTIC support for Web-Site changes
- AF providing funds to maintain and transport display

#### ◆ Key Milestones

- Complete display update: Nov 2004
- Web-Site Redesign: June 2005



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## Work Plans

### #2 Potential Areas for DND/DoD Cooperation on Homeland Defense

#### ◆ Requirement

- Review Cooperative Homeland Defense Initiatives
- Focus on Technology, Acquisition and Logistics efforts (excludes CBRNE and Major Weapon Systems)
- Tied to DoD/DND roles in Civil Support and Aid to Civil Power
- Identify Gaps and Develop Recommendations

#### ◆ Expected End Item

- Presentation outlining process and findings
- Action Plans for Recommendations

#### ◆ Resources

- DND: DGIIP & ADCA
- DoD: ASD(HD), AF & Army

#### ◆ Key Milestones

- Develop TOR for HD Working Group (*signed April 2005*)
- Jan 2005: Kick-Off Study
- Jun 2005: Brief Preliminary Findings at SCM
- Dec 2005: Release Final Report



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## Work Plans

### #3 First Responder Access to Military Equipment

#### ◆ Requirement

- Identify military equipment of use to First Responders in various emergencies
- Assess current availability and location of identified equipment
- Identify constraints/barriers to issue and movement of equipment (both domestically and cross-border)

#### ◆ Expected End Item

- Presentation outlining process and findings
- Detailed Report
- Recommendations with Action Plans

#### ◆ Resources

- DND: DGIIP and ADCA
- DoD: ASD(HD), AF & Army

#### ◆ Key Milestones

- Jan 2005: Develop Resource Strategy
- Jun 2005: Brief Preliminary Findings at SCM
- Mar 2006: Release Final Report





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## *Work Plans*

### #4 MOU Revision/Amendment

#### ◆ Requirement

- Review the NATIBO MOU for Amendment
- Include U.S. export control-related language, once finalized
- Add other improvements as required (e.g. Project Equipment Transfer (PET))

#### ◆ Expected End Item

- Revised MOU with new export control-related language and other improvements

#### ◆ Resources

- DND: DGIIP
- DoD: OUSD(AT&L)

#### ◆ Key Milestones

- August 2005: Establish Ad Hoc MOU Review Group
- Jun 2006: Provide MOU Review Group feedback at next SCM
- 2007: Finalize Changes



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## Work Plans

### #5 Airborne Surveillance

#### ◆ Requirement

- Increased Military Importance of Battle Space Awareness
- Multitude of Platform Options (Manned Aircraft, UAVs, Airships)
- Increased complexity of mission equipment, communications links, and information processing
- Application for Homeland Defense/Security

#### ◆ Expected End Item

- Reference Source & Decision Support Document
- Customer(s): OSD, DND, Services, DHS

#### ◆ Resources

- Air Force and DCMA Industrial Base Data & Information
- DND: DGIIP

#### ◆ Key Milestones

- 4<sup>th</sup> Qtr CY 2005: Air Force will research platforms, mission equipment, and industrial base (manufacturers) and prepare document from which scope of detailed effort can be developed
- Dec 2005: Develop TOR for Working Group
- 1stQtr CY2006: Initiate Study
- Mid 2007: Complete Study



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## *Measures of Success*

### ◆ **Memorandum of Understanding**

- Number of Working Groups/TORs in place
- Number of PAs executed/\$ associated with PAs
- Approval cycle times
- Number of projects successfully taken to completion
- New project starts
- Benefits to Government/Industry

### ◆ **Studies & Assessments**

- Time to initiate and complete
- Number of recommendations acted on
- Number of new studies/assessments initiated
- Benefits to Government/Industry

### ◆ **Advocacy**

- Web site activity
- Attendance at display



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## *Summary*

- ◆ Proposed Business Plan represents an incremental approach to increasing NATIBO visibility in DoD and DND
- ◆ Business Plan reflects small to moderate increase in resources
- ◆ Emphasizes a focus on North American Security/Defense
- ◆ Overall Goal is for NATIBO to provide increased value to the defense of both countries